SharePoint:
Barriers to End User Adoption- and How to Overcome Them

- *a paper drawing on the experience and opinions of SharePoint Professionals.*

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CONTENTS

Introduction 3
Findings 4
Knowledge and Perception – “a Glorified file share” 4
Just Because It’s There 7
Culture, Fear and Inertia 8
The Executive Sponsor 10
Business Alignment 11
Feel the Pain and Find the WIIFM 14
Training 17
The SharePoint Cheerleader 20
End User Engagement 23
Summary and Conclusions 27

INTRODUCTION

It's easy to deploy an application like SharePoint within an organisation, the hard part is getting people to use it in a way which makes them more productive – this is the core issue addressed by the paper.

It has been demonstrated statistically that whilst use of SharePoint for file sharing at the work group or departmental level is widespread in organizations, deployments where usage of SharePoint is enterprise standard and embedded in core business processes, are far less common.

This paper explores some of the possible reasons for this, and should help organisations to achieve SharePoint deployments which leverage the full power of the application in relation to core business processes.

The paper came as the result of a number of online discussions within the SharePoint community. In September 2009 we asked a question in a number of SharePoint related groups and forums:

> *"In your opinion and experience, what is the biggest barrier/obstacle to end user adoption of SharePoint?"*

The question was answered – often at length, by more than 50 SharePoint professionals from around the world and this paper summarizes their responses.

Those who contributed include consultants, administrators, systems architects, end users and power users – their combined experience makes the paper a valuable resource for anyone embarking on a SharePoint deployment.

Topics covered include:

- Perception and Understanding
- SharePoint roles and Responsibilities
- Training
- Culture and Inertia
- End User Engagement Business Alignment

The paper highlights barriers encountered and offers valuable insights into how to overcome them.

To the qualitative insights generated by responses to this question we have added statistical data drawn from the AIIM report "State of the Market: Microsoft SharePoint" which is based on a study of over 600 businesses, carried out in November 2008.

FINDINGS

KNOWLEDGE AND PERCEPTION – "A GLORIFIED FILE SHARE"

It quickly became clear that respondents felt that a widespread lack of understanding/misunderstanding of what SharePoint is, what it can do or how and why it might be used, was a major barrier to end user adoption.

> *"My experience has been that the end users do not understand how to collaborate between teams, and do not understand the benefits of SharePoint over using Outlook and the File Server. The users also don't understand how collaboration helps their business processes. "*

Stacy Syphrett

Systems Analyst

> *"Most end users are simply not aware of the possibilities SharePoint offers"*

Mark van Dijk

Information Technology and Services Professional

Respondents also saw a lack of knowledge and understanding at the organizational level, which would also impact on end user adoption:

> *"It could also be that nobody in the organization understands how to use the base functionality, so the users think it's just a glorified document storage tool."*

Cole Shiflett

Solutions Architect

> *A Bing and Google search combined bring back 19 million search results on "SharePoint", how are users expected to know where to begin without the guidance of subject matter experts?*

Veronique Palmer
SharePoint Business Consultant and End User Trainer
Lets Collaborate

Respondents reported that in their experience, where users did feel they had an understanding of SharePoint, they most often understood it to be a file sharing platform:

> *"Many businesses make use of SharePoint's ability to index documents and to give "teams" their own space to place documents and in most implementations I have seen sharepoint has only been used as an over glorified file storage and index facility. Most people do not understand due to lack of training that SharePoint can be so much more. "*

Michael O'Brien
Microsoft Platform Specialist

> *"Biggest hurdle in adoption is to make SharePoint more than "just another place to put files".*
>
> *Couple of ideas... Use the full feature set. Find ways to incorporate features like forms, work flow, alerts to simplify your users' day and eliminate manual processes. Secondly, use the power of search to help minimize time spent digging through file shares for information. "*

Sebastian Atar
Consultant , C/D/H



Statistically, the AIIM report found that amongst businesses that used SharePoint file sharing was the most widely used functionality - with 97% of respondents using SharePoint for this purpose. However, in terms of fostering end user adoption, File Sharing may not be the best place to start with a roll out of SharePoint for a number of reasons:

To the end user the benefits of using SharePoint for file sharing may be difficult to identify. It may seem like a rather more cumbersome version of network folders, actually requiring more work rather than solving any pressing problem.

Secondly, first use of SharePoint for file sharing does nothing to help users experience the web based collaborative nature of the solution.

JUST BECAUSE IT'S THERE

Firstly it should be remembered that WSS is delivered to organizations free with their server. It's just there, so it is easy to understand the temptation to just use it:

> *Lack of planning and direction on how SharePoint is going to be used.*
> *"Ya, lets deploy SharePoint"*
> *"But what are we going to use it for?"*
> *"You know, that collaboration stuff the employees do…?!?"*

Joshua Fuente

SharePoint Enterprise Administrator

Respondents report SharePoint simply being "released" to individual groups within the organization as a solution to specific issues.

> *"It could be that IT simply installed it and said "here ya go" and did nothing to integrate it into strategic business needs,"*

Cole Shiflett

Solutions Architect

This sentiment is re-enforced quantitatively, by the AIIM report, which sees adoption of SharePoint as a grass roots movement, with the majority of SharePoint deployments being at the work group (69%) or departmental level, with a far lower number having deployed at the organizational level (39%)

> *"If there are (or need to be) business processes around collaboration, document storage and audit-trails for various work efforts, then SharePoint would in all likelihood get adopted fairly easily and readily by a target community. If it's another nightmare killer app being shoved down the workers' throats by management and IT, well, good luck with that. "*

David Whitney, MBA

DOD Information and Systems Engineering Practitioner



CULTURE, FEAR AND INERTIA

Where SharePoint has been released into an organization with little forethought or planning it is perhaps not surprising that our respondents report resistance, apathy and inertia in some circumstances.

> *"Inertia is the biggest issue--people just want to keep on keepin' on."*

Barbara J. Silvis

Vice President and Manager, Loss Prevention Web Resources

This sentiment is likely to ring bells with anyone who has tried to implement new technology into any sort of organization. But with a SharePoint implementation the issues may go even deeper:

> *Culture change: employees are not so familiar with Internet for many reasons and the matter of structuring and formalizing information for collaboration is not a reflex.*

Patrick BACHET

Owner Planet Award

> *"SharePoint is a powerful tool, but the key to adoption is that COLLABORATION (yes I'm yelling) is a new process in the corporate and governmental worlds. Yes 20 to 30-somethings get it, but we're not the managers and leaders of organizations yet. Workers need to be guided that keeping a single copy of a financial spreadsheet in a document library is more efficient than sending 20 copies out and then collating. This, however, is a challenge to the status quo."*

Adam Levithan

Technology Consultant, SharePoint Architect, and Trainer

For those brought up on Facebook, instant messaging and Wikipedia SharePoint is going to come naturally, and for the rest of us it will be a new way of working; and in some cases a threatening one:

"From what I'm experiencing....knowledge and not being able to adapt to new technologies that can improve collaboration. SharePoint has everything it takes to work on a unified platform with Office & Exchange...but as long as people don't want to learn or adapt to new things, we'll keep encountering those barriers...."

Kurt Van Hoecke

External Licensing Sales Specialist

THE EXECUTIVE SPONSOR

> *"Without management buy-in…forget about it."*

David Whitney, MBA

DOD Information and Systems Engineering Practitioner

Many respondents felt that securing the commitment of a senior level executive sponsor was key in overcoming some of the barriers identified here.

> *"It also starts with a proper sponsor. Someone high up that supports the initiative and provides/approves for proper scoping, design, deployment and management and control throughout the rollout. If these areas are met hopefully end user adoption will be a component and be addressed through the process."*

Kevin Powell

Senior Analyst, SharePoint Admin/Developer

> *"Getting a project sponsor's buy in is also an issue and when it is not driven from the top it makes it even harder for the end users."*

Veronique Palmer
SharePoint Business Consultant and End User Trainer
Lets Collaborate

BUSINESS ALIGNMENT

> *"There should always be clear understanding of what objective you want to achieve when rolling out SharePoint in an organization. In fact there is so much functionality provided by SharePoint, that sometimes it's impossible to determine where users will take the product. "*

Razi Rais

SharePoint MVP

As we saw in a previous section, SharePoint is used more widely at the work group or department level than organization wide. In the same vein, the AIIM report shows quantitatively, that whilst much SharePoint functionality is used widely within surveyed organizations, very few are using SharePoint in an "Enterprise Standard" capacity. SharePoint is rarely being used in relation to core business activities, such as customer service, compliance or Business Process Management. This finding is also echoed in our qualitative results. Respondents report that in order for the full power of SharePoint to be used in relation to core business processes a clear, business-aligned, project mission is required.

> *"SharePoint first perception for users is often "advanced document management" or "improved Intranet". To get full benefits of SharePoint, it must be understood as a platform to manage/support real, consistent and comprehensive business processes. In consequence there is a real work of designing / reengineering business processes and to translate them into SharePoint technologies…as this job was done with SAP implementation. It is so a re- engineering that we cannot just wait for user requirements but we have to propose innovations in business process to the end users. In simple words the question to the end users i.e.: what are the issues you face in your business and we have to prove to these users that SharePoint can help them in solving these issues. "*

Patrick BACHET

Owner Planet Award



"In my opinion the biggest challenge comes about when the SharePoint project does not have a clear defined business objective. Once you get your first couple of quick wins from SharePoint and business owners start to realize the benefits and potential it becomes easier for them to justify and thus buy into the change."

Eamon Breen

Owner, Inspired Software and Services

"As a company we use the role of information/solution architect to help them bridge the gap between what SP can do and what they need to accomplish. The most critical part of the interaction is the second part. "What do you need to do and what do you want to do?" I ask these questions many times a day because if they are clear and reasonable it becomes a small matter to identify the platform and solution.

Teach your users to answer the need and want questions before looking at SP for the solution and they will find the process goes immeasurably more smoothly. "

Art Gelwicks

Information/Solution Architect

"Deploying SharePoint without a clear mission or business objective will hinder user adoption. "

Robert Brockhaus

Technical Solutions Architect



Some respondents also identify the possibility that starting with a grass roots/work group based implementation may hamper later adoption of SharePoint at the enterprise level.

> *"We are brought in to clean up a poor implementation of SharePoint because the users demanded it. They usually have implemented it in their department to solve issues and it other departments see it and the wild fire spreads unchecked. Everyone wants it and IT is at a loss to control it.*
>
> *The ensuing fallout with IT is where I find the difficulty for adoption. IT does not have the manpower or resources to bring it into control nor do they have the knowledge to develop and implement proper governance. Governance to me is key and must be done from the beginning to ensure controlled adoption that fits within the overall business objectives and IT strategy.*

Caleb C Morris IV, MSc, PMP
PMP Certified Project Manager, Ciber

Feel the Pain and Find the WIIFM

Having identified corporate objectives for SharePoint deployment, respondents felt that the next key step for success was to

It was mentioned often that due to the complexity of SharePoint, implementations tended to be more successful, in terms of end user adoption, where the initial implementation was quite small and simple, addressing a particular and specific end user issue.

> *"Too much, too fast. Pick an area where employees have a real need (and are experiencing pain in their current systems). It could be anything from simple calendaring to document management to review/approval workflows. Start slow, and don't roll out too much at one time. "*

Brad George

Senior Consultant

> *"The best way to get end users (and management) on board is to first determine their pain points and then develop a solution that makes think 'wow this SharePoint thing is the best thing since sliced bread, wonder what else it can do'? From that success you can build additional solutions and improvements that are more complex and require further buy in and user adoption. I don't care how simple the first wow solution is, i.e. conference room sign ups, business travel request approvals, or a weather web part. Get some value out of the implementation from the start and you'll get users on board. "*

Robert Brockhaus

Technical Solutions Architect

> *"I've found if you develop a solution to what is perceived as a very big problem (by the users!) and deploy that very carefully WITH them, they become champions and then you're off and running. Just be very specific about your first solution delivered and you'll be fine! "*

Barbara J. Silvis

Vice President and Manager, Loss Prevention Web Resources

Looking at the same issue from a slightly different angle many respondents felt that planning an implementation with the end users "What's in it for me?" question top of mind could well be a recipe for success.

> *"The WIIFM has to be answered before a solution is chosen. What has not happened is the end-user analysis to understand the current pains and then define solutions around that pain. If this was done before solution selection phase and development, the success ratio would be very different."*

Harold Rozario

Information and Process Management Specialist

Wise RIM

> *"Users find the WIIFM (what's in it for me) and are motivated to learn to use it. Executive sponsorship is needed, but the real emphasis needs to come from the user community, which will drive growth. A good adoption strategy will have a viral effect on an organization, and new users will be clamoring to be part of it."*

Joan Muschamp (Fagnani)

Marketing Manager, Applied Knowledge Group

Where the WIIFM is ignored, it was felt that successful implementation was much less likely.

"It is most important for the end user or the people affected by the change to have an answer this most important question in their mind "What is there in this for me? How is this going to benefit me?" Most often this aspect is completely ignored and there is forced adoption policy implemented."

Vinod Ponoth

Experienced Information Technology Executive

TRAINING

> *"Lack of end user training. I cannot think of any other solution that gets deployed with less user training. (Except maybe the phone system)"*

Joshua Fuente

SharePoint Enterprise Administrator

Given that quite a number of our respondents were training consultants, it is perhaps not all that surprising that training was seen as an extremely important factor in successful end-user adoption of a SharePoint deployment.

However, the presence of some bias need not invalidate the comments. Given that the majority of SharePoint deployments are "grass roots" driven, and at workgroup or departmental level it is perhaps not surprising that accompanying training strategy was seen as somewhat lacking.

However, given the power and complexity of SharePoint respondents felt that this could have serious repercussions.

> *"SharePoint, especially MOSS, is a very powerful platform, but that's part of the problem. Companies have to adopt a new paradigm to take full advantage of MOSS. Users (who learn how to use it) have immense power in their own hands to create solutions to their business needs... no more submitting a development request to the IT department. Too often SharePoint is stood up in organizations with little thought as to how they will leverage the technology, little training on what it can do, and even less on how to do it. "*

Rich McAdams

President at enGenius Consulting Group

In arguing the case for thorough training respondents stressed the complex and unfamiliar nature of SharePoint technology:

> *"Concepts such as field types, site columns, content types, document libraries (check in/out), and workflows are new to many users. I work with clients to insure that they have a solid communication, training, and support plan around their SharePoint implementation. Once users are educated and supported, they willingly adopt SharePoint. "*

Steven M. Fowler
Founder & Principal at SharePointPS.com

> *"Lack of end-user training. They do not know what can be done and how. When they know something, they know that SharePoint can be used to share documents. "Uhmmm, why do I need SharePoint if I can share my documents using network folders??"*

André Magni
Training / Consulting Executive

Some respondents expressed concern regarding "over technical" training, perhaps not best tailored to users specific business needs.

> *" The standard of training in the industry is not all that high either, there is a disconnect between the theory and real world situations and trainers tend to be too technical for the business users."*

Veronique Palmer
SharePoint Business Consultant and End User Trainer
Let's Collaborate

Also, a number of respondents felt that SharePoint training should not be a "one off" event, but rather an ongoing process.

"In my SharePoint consulting/training experience, from the end-user perspective, the low adoption rate is because of lack of proper end-user business-specific hands-on training.

Adoption can be achieved if there exists continuous learning in forms of retraining / mentoring every 3-6 months after deployment."

Denny Daniel
Technology Trainer

"Persistent training is key. SharePoint training shouldn't be looked at as a point-in-time event. It needs to be applied throughout the lifecycle of the product."

Lee Reed
Senior Principal Consultant

THE SHAREPOINT CHEERLEADER

In addition to the executive sponsor, the trainer the project planner and the system administrator respondents identified another role which was seen to make a significant contribution to the successful end user adoption of SharePoint.

> *"The most successful user adoption here has happened when there is an onsite champion who takes the initiative to drive it into business and make sure end users are trained sufficiently, as well as ensuring they become product experts themselves. Hand holding / floor walking for at least 6 months helps. Constant contact with your user base; send tips, tricks, news etc on a weekly basis. A user group with monthly meetings is a must. A site dedicated to all things SharePoint in your organization so users know where to get help is a winner. Walk the talk and lead by example. "*

Veronique Palmer
SharePoint Business Consultant and End User Trainer
Let's Collaborate

This individual, probably one in each area of the business, combines a degree of technical ability with a "hands on" understanding of end user issues.

> *"You really need an SME on each "team" or where ever it makes sense. I think users are more apt to use it if someone can really show them how it can use it day-to-day. Yes there are some users that can just take to it, but the vast majorities of them look at it, and think, "Ya, that's nice, but how does it help me?" This is especially true when users are "hooked on" managing everything via email, PSTs, and file servers. "*

Joshua Fuente
SharePoint Enterprise Administrator

> *"I agree. Lists of SharePoint roles will always mention the need for infrastructure and developer roles but often forget the need for the business solution role that is crucial for delivering success. "*

Aidan Garnish

SharePoint Technical Lead

The ability of this group to act as a conduit of information between the end user, and the project team, is seen as critical to the project's success.

> *"There is an interesting "business user" layer that I feel is often neglected with SharePoint and other Enterprise level applications. In most deployments.*
>
> *"Power Users" will make up a pretty small portion of your user base. Even with more robust end user training I feel, as software pros it's our job to remember that SharePoint isn't the job of the functional users. They have their own priorities, and mastering SharePoint probably isn't one of them.*
>
> *This is why I recommend a "middle-tier" of Business Solution Support. Basically it's the job of these people to listen to requirements for small or localized business problems and see what can be solved with out of the box, help the business users build the solutions, and route the requirements that can't be met up the chain.*
>
> *SharePoint is capable of delivering tons of value without any customization, but most people even with some training just learn the basics. I feel that its arrogant to expect your average business user to be a SharePoint wiz, be linking lists, configuring workflows etc. The middle tier I am describing is constantly demonstrating the value to both end users and upper management by taking real business problems and helping users solve them with SharePoint on a regular basis.*

Sometimes users feel that SharePoint isn't going to solve THEIR problem. But maybe it CAN with a little help from someone more experienced. My advice is, don't install an environment and say "go forth and SharePoint". Rather, engage users, take requirements and see how you can help people solve their problems."

Justin Devine, MCP, PMP
Technology Strategist

End User Engagement

Many respondents felt that the most successful deployments were those where the end user was engaged and involved from the start:

> *"I have found if you get users involved in the design process, it automatically creates buy in and even SharePoint champions. Since the design is the hardest part, and arguable the part that gets glossed over the end users are the ones who pay the ultimate price. Find out what their current "issues" are with processes in the organization and then determine how SharePoint can solve those issues."*

Sharee English
Director of Information Services, SeattlePro

> *"Make the user community part of the planning process and get out in front of the implementation with training and "did you know that you could..." brown bag talks or video blogs on the corporate Intranet. Users obviously need to know what's in it for them. Treating them like junior Marines and ordering them to use it will, in all likelihood, result in a slow or non-existent adoption of the system by the targeted user community."*

David Whitney, MBA
DOD Information and Systems Engineering Practitioner

Respondents felt that a well planned adoption strategy was key.

> *"A lack of a well planned adoption strategy which needs to focus on the People and the Process, so users find the WIIFM (what's in it for me) and are motivated to learn to use it. Executive sponsorship is needed, but the real emphasis needs to come from the user community, which will drive growth. A*

> *good adoption strategy will have a viral effect on an organization, and new users will be clamoring to be part of it."*

Joan Muschamp (Fagnani)
Marketing Manager, Applied Knowledge Group

It was also thought to be very important that adoption should not be forced, coerced or prescribed:

> *"The methodology of implementation is crucial to the overall success of MOSS or any other solution implementation. It should not be forced or prescribed to end users."*

Harold Rozario
Wise RIM

There was also seen to be a need to be aware to the end users existing work load when planning roll out:

> *"An adoption plan should be one that integrates into the end users normal routine instead of requiring them to learn lots of new processes.*
> *Your team, and for that matter your organization probably already has more work in front of it than it does hours in the day.*
> *With that in mind you need a plan that keeps it simple and keeps it aligned with the groups you are rolling out to.*
> *To the IT team (Typically your first adopters) this curve can be a lot sharper than for the business side. "*

Sean OReilly
VP of Sales, black blade associates

Failure to plan with or for the end user was often cited as a barrier to successful adoption.

> *"Lack of end user engagement: no one ever asks the user to test drive, and even asks what they might do with it."*

Joshua Fuente
SharePoint Enterprise Administrator

> *"In my experience, the users are generally last on the list of people to be informed about a system implementation ("we're still building it, we can't tell you anything yet"), and only thinking about buy-in at implementation is major point of failure."*

Cara Turner
SharePoint Information Architect and Project Manager
Airborne Consulting

Where these issues were taken into account during implementation planning, respondents reported highly successful roll outs.

> *"SharePoint has a huge variety of options for different needs. We are a small company and had a workshop first what we can do with SharePoint and based upon that developed our specific requirements what we would like to do with Share-Point. Acceptance is high by my employees because they have been an active part of the process. And by trying things out in test environment they are getting great new ideas."*

Sandra Soniec
Managing Director

> *"From a different perspective, we have a client who have rolled out intranet and extranet highly successfully - it's not always a case of "if you build it they won't come".*
>
> *In this company's case, intranet was rolled out first, and Mar-*

keting was involved from the start, driving the implementation, while IT built according to business requirements.
The company made a serious marketing effort to communicate to staff primarily how the intranet would resolve their issues, and then how it would benefit business. Super users were trained early in the build, and made owners of the content in each of their areas.

They also had a very thorough launch strategy, using the launch to celebrate and educate, with a focus on fun and buy-in (content-related competition as a SharePoint survey, with good prizes). The end result: user adoption was fantastic.

They are just launching their extranet now, and have had a similar level of feedback. Users really appreciate:
1. a site that is well structured, elegant, that has good branding, that make the user feel that they are worth the effort that the business has spent on them
2. Being made to feel that the site is for their use, not just a place for HR documents to live
3. Last on the list is the usefulness (although obviously, if usefulness hasn't been considered, the implementation will fail).

Cara Turner
SharePoint Information Architect and Project Manager
Airborne Consulting

SUMMARY AND CONCLUSIONS

From both the responses to our qualitative question, and the quantitative findings of the Aiim report it would seem that if a SharePoint deployment is to be considered successful in terms of end user adoption then that adoption should be:

- Broad – in terms of use of a wide range of SharePoint functionality
- Deep – in terms of use of SharePoint in relation to core business processes.
- Pervasive – in terms making SharePoint usage Enterprise Standard.

Some of the main barriers to adoption which have been identified include:

- Lack of knowledge and understanding
- Perception of SharePoint as “just another file share”
- Lack of Executive Sponsorship
- Inertia and Cultural Issues

In order to achieve these objectives respondents point to a number of key considerations, including

- Clear business alignment
- End User involvement and training
- Identifying “What’s in it for me” and genuine pain points.

Overall, the main message seems to be that to successfully foster end user adoption of SharePoint the end user should be involved informed and considered, throughout the process.

However, allowing the local and immediate needs of the end user to become the focus or driving force behind an implementation is likely to limit its success in terms of using the full functionality of SharePoint in relation to core business processes.

Pentalogic Technology

This paper has been produced by Pentalogic Technology, who design web parts for use with SharePoint. Our products help end users to work more productively in a SharePoint environment.

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